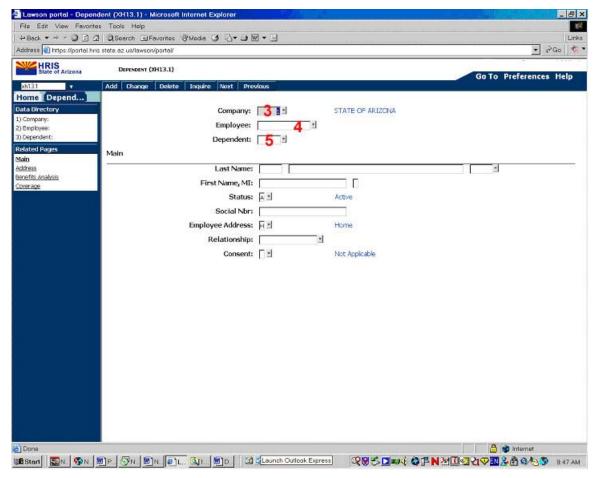# HRIS Task Step Chart
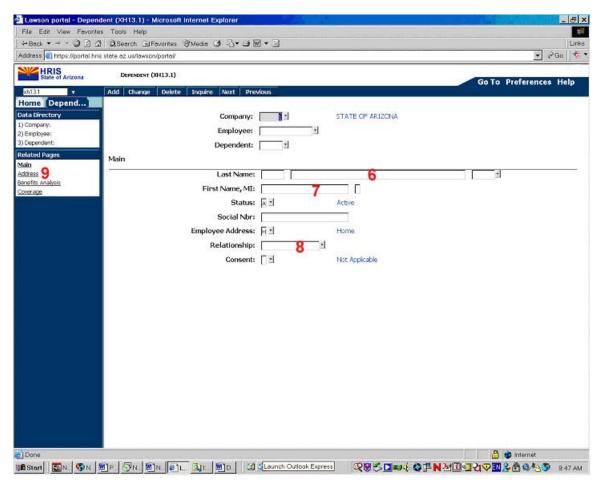## New Participant Administrative Enrollment

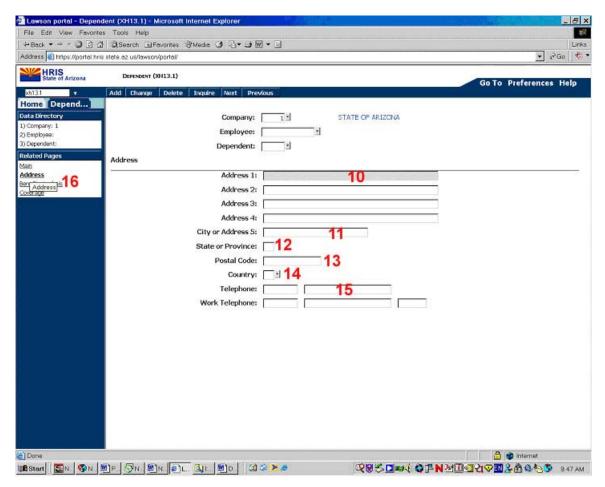**Step #**
NOTE: All information MUST be entered in ALL CAPITAL LETTERS.
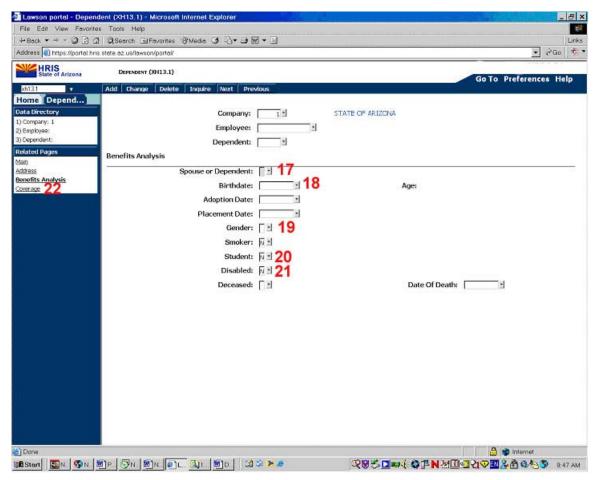

1. Each step of the **New Participant Enrollment** chart corresponds with a red circle in each figure.

2. If the participant is not currently enrolling any dependents, **Skip to Step #25**. **Start** with the *Dependent Form* (*XH13.1*).

3. **Company: Select** the appropriate **Company** from the drop down menu. **Enter** "**1**" for **Active** employees or "**7**" for **University** employees or **Retirees**.

4. **Employee: Enter** the **Employee's Identification Number** (**EIN**).

5. **Dependent: Click** on the drop down menu next to dependents. This will display the employee's existing dependents. If the employee has no existing dependents, "**No records meeting criteria**" will be displayed on the gray window frame in the bottom left-hand corner. Next, click **Close** on the blue tool bar at the top of the window. **Enter** the dependents sequentially, starting with "**1**," in the dependent box.
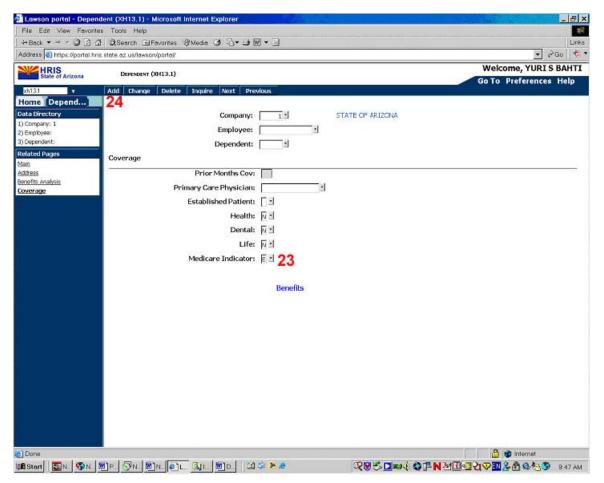
6. **Last Name: Enter** the dependent's last name in the second text box to the right of the **Last Name** label. If the dependent has a suffix (e.g., Jr., III), **enter** this information in the third text box using the drop down menu.

7. **First Name, M.I.: Enter** the dependent's first name and middle initial in the separate boxes provided.

8. **Relationship: Select** the relationship of the dependent to the employee from the drop down menu (i.e., **CHILD**, **GUARDIAN**, **PLACEADOPT**, **SPOUSE**, or **STEPCHILD**).

9. If the dependent's and employee's addresses are the same, **skip to step #16**. If the dependent's address is different from the employee's address, **click** on **Address** under the **Related Pages** link on the left of the page.
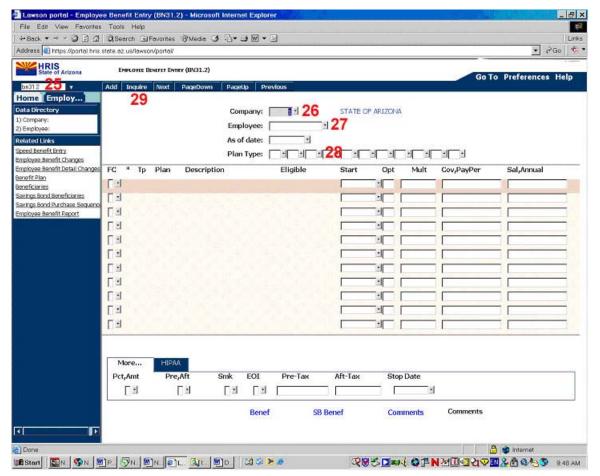
10. **Address Line 1-4: Enter** participant's address in the first line, and if it does not fit, use the extra lines provided. **Do not use punctuation**.

11. **City** or **Address Line 5: Enter** the full city name without abbreviations.

12. **State: Enter** the state using the standard two-letter State abbreviations (e.g., **AZ**, **CA**, **WY**)

13. **Postal Code: Enter** the five-digit zip code.

14. **Country: Enter** the country of residence, using **US** as the abbreviation for United States.

15. **Telephone:** This entry is **optional.** If entered, use the second text field to the right. The telephone number should be in the following format: **602.542.1234**.

16. **Click** on **Benefits Analysis** in the **Related Pages** link on the left of the page.
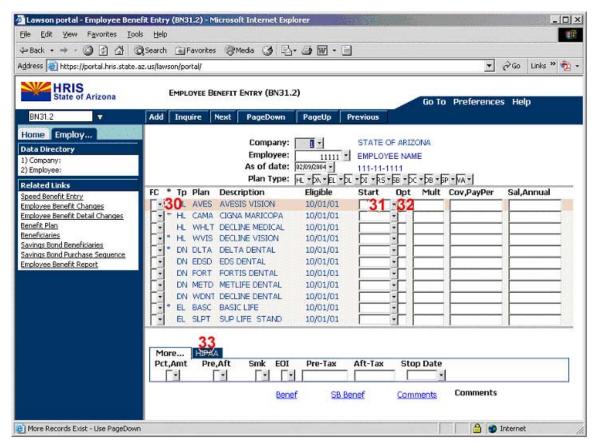
17. **Spouse or Dependent: Select** from the drop down menu, or **enter** "**S**" for **Spouse**, or "**D**" for **Dependent**.

18. **Birthdate: Enter** the birthdate for the dependent. This is a **required field**, and the format for the dependent's birthdate should be as follows: **MMDDYYYY** (i.e. **02202003**).

19. **Gender:** Select "**M**" for **Male**, or "**F**" for **Female** from the drop down menu.

20. **Student:** This defaults to "**No**". **Change** to "**Yes**" **only if**, the dependent is not the spouse, over 18 years old, and a full time student.

21. **Disabled:** This defaults to "**No**." **Change only if applicable**.

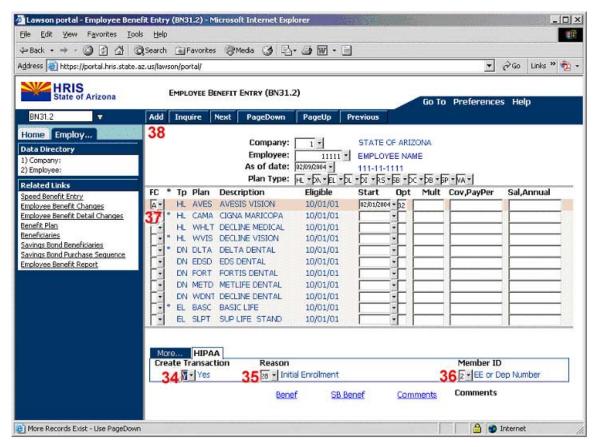22. **Click** on **Coverage** in the **Related Pages** link on the left of the page.

23. **Medicare Indicator:** This is defaulted to "No Medicare". If applicable, **select** the appropriate item from the drop down menu. The default is "**E**" for "**No Medicare**." Select "**A**" for "**Medicare Part A**," "**B**" for "**Medicare Part B**," "**C**" for "**Medicare Part A and B**," "**D**" for "**Medicare Part Unknown**," or "**E**" for "**No Medicare.**"

24. **Click Add** on the blue tool bar. This will display "**Add complete, continue**" in the gray, bottom left-hand frame of the window. Once all dependents have been added, **continue** to **Step #25.** To add multiple dependents, **click Main** in the **Related Pages** link on the left of the page, **enter** the next sequential number (for example if the first dependent you entered was dependent number 1, the next dependent would be number 2), and **repeat Steps #5-#24** for each subsequent dependent to be enrolled. This completes the steps to add the dependent(s).
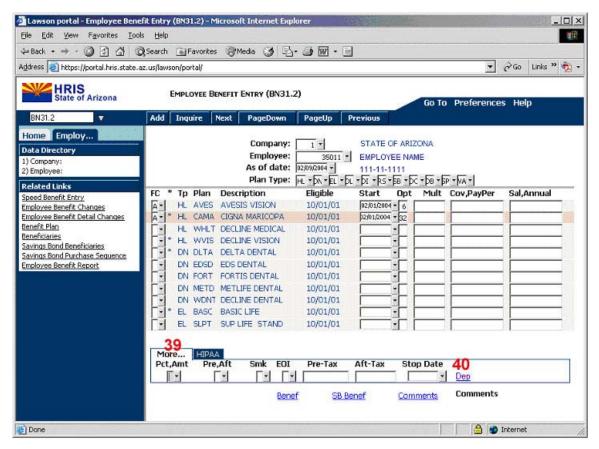
25. When all dependents have been added, go to the *Employee Benefit Entry (BN31.2)* page by typing *BN31.2* in the text box in the top left-hand corner of the window, and press **Enter**. **NOTE:** If participant has elected to **decline coverage** of a certain plan, they **must be enrolled in the decline plan for that coverage**. If the employee information (**employee's name**, **EIN**, and **company**) is already displayed at the top of the page, **skip to Step #28**.

26. **Company: Select Company** from the drop down menu. Enter "**1**" for Active employees or "**7**" for University employees or Retirees.

27. **Employee: Enter** the **Employee Identification Number** (**EIN**).

28. **Plan Type: Select** the combination of plan types for all plans that apply to the employee's enrollment form from each drop down menu.

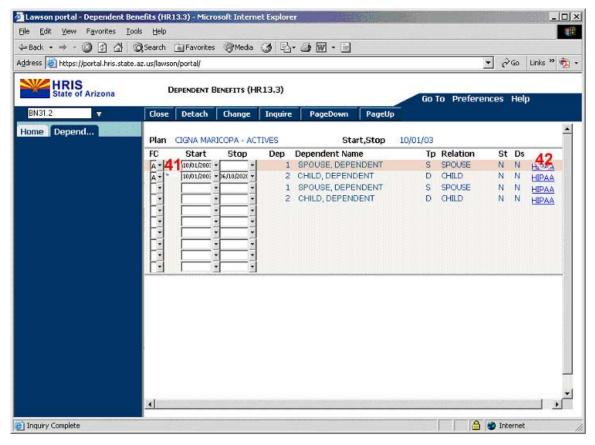29. **Click Inquire** on the blue tool bar. This will display the selected plan types in the appropriate fields.

30. **FC: Enter** or **type** "**A**" or **select** "**Add**" on each line to add the plan on that line.

31. **Start: Enter** the **Effective Start Date (MMDDYYYY)**, which is the 1st of the next month after the date of hire for new hires.

32. **Opt: Enter** the option number that corresponds to the plan elected by the employee. If you do not know the option code, use the "DRILL" option by right clicking in the option box and selecting the appropriate option.

33. If you are **not** adding a **Medical, Dental,** or **Vision** plan, **Skip to Step #37**. Otherwise, make sure each medical, dental and vision plan (if elected) is highlighted in brown before completing the **HIPAA** transaction, by **clicking** on the blue **HIPAA** tab at the bottom of the page. This applies to all selections of **Medical, Dental,** and **Vision** coverage. A **HIPAA** transaction must be completed for the **Medical, Dental,** and **Vision** plan(s) before completing the next step.
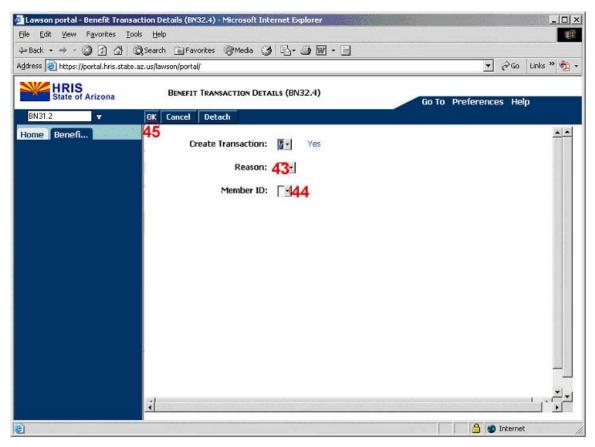
34. **Create Transaction: Select** or **enter** "**Y**" for "**Yes**." **Note:** Health, Dental, and Vision plans must select "**Y**."

35. **Reason: Select** the appropriate reason from the drop down menu. For a new participant, **type** "**28**" or **select** "**Initial Enrollment**" from the drop down menu.

36. **Member ID: Type** "**2**" or **select** "**EE or Dep Number**" from the drop down menu. **Do not select "1" for "SSN."**

37. If a participant has elected to decline a plan, **repeat Steps #30-#37** to enroll the participant in the declined plan (i.e. **DECLINE MEDICAL, DECLINE VISION, DECLINE DEPLIFE**, etc.). You **do not** need to complete a HIPAA transaction if the participant is enrolling in a **decline plan**.

38. **Click** the **Add** button in the blue tool bar at the top of the window. This will display "**Add complete, continue**" in the gray, bottom left-hand frame of the window. This completes the plan enrollment steps. If you are **NOT adding dependents to the medical dental or vision plans**, **skip** to **Step #50.**
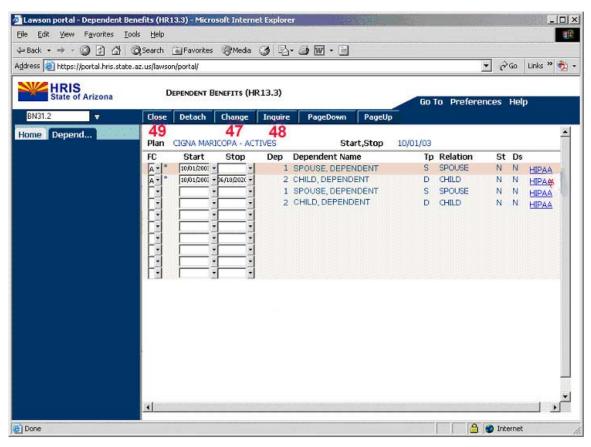
39. If you are enrolling **dependents**, **click** on the line of the particular plan to which you are adding them, to highlight that plan. **Click** on the blue **More** tab at the bottom of the page. At the end of the **More** tab is a **Dep** link.

40. **Click** on the **Dep** link to add dependents to each plan. This **Dep** link will take you to the *Dependent Benefits* (*HR13.3*) form which will allow you to add dependents.
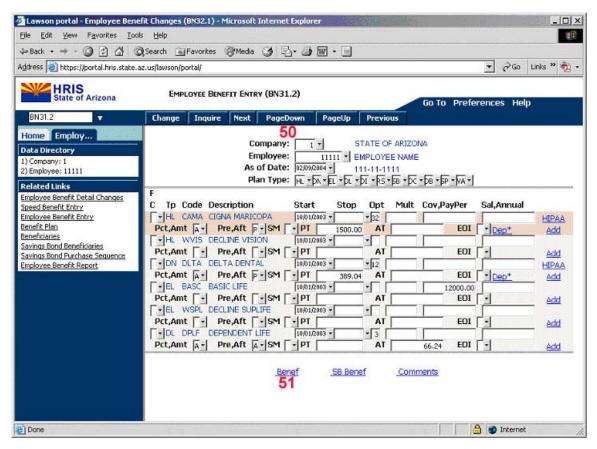
41. **FC: Enter** or **select** "**A**" or "**Add**" in front of each dependent to be added to the plan. This may include multiple dependents (e.g., spouse and one or more dependents). Each dependent must be added individually.

42. **Click** the **HIPAA** link to the right of each dependent to complete the HIPAA transaction.

43. **Reason: Click** or **enter** "**28**" or "**Initial Enrollment**" from the drop down menu.

44. **Member ID: Enter** "**2**" or **select** "**EE or Dep Number**" from the drop down menu. **Do not select "1" for SSN**.

45. **Click** the **OK** button on the blue tool bar at the top to return to the *Dependent Benefits* (*HR13.3*) form.

46. **Repeat** steps **#41-#46** for each dependent to be added.

47. Once all dependents' HIPAA information has been added, **click** on the **Change** button on the blue tool bar at the top. This will display **"Add complete, continue"** message in the gray, bottom left-hand corner of the window.

48. **Click** the **Inquire** button on the blue tool bar to ensure that each dependent has been added. An asterisk next to the dependent indicates they are enrolled in the plan.

49. **Click** the **Close** button on the blue tool bar to return to the *Employee Benefit Changes (BN32.1)* form. This **does not** add the dependents to **all family plans**. To add the dependent(s) to other plans, **repeat Step#39-#50.**
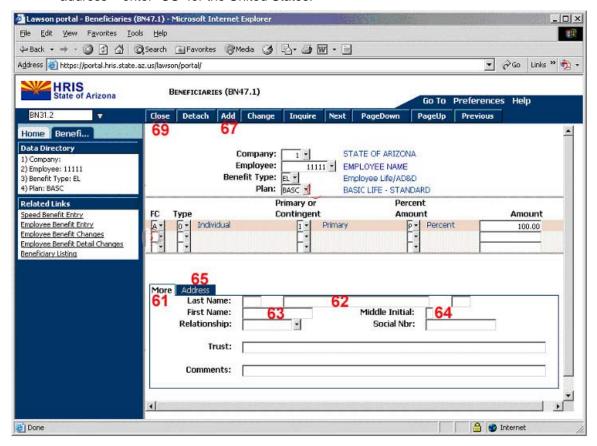
50. After adding dependents or enrolling the employee in the applicable plans listed on the screen, click page down on the BN32.1 to continue benefit elections on the remaining plans.

51. After enrolling the employee and all dependents in the plans, **click** on the **Benef** link at the bottom of the form to access the *Beneficiaries (BN47.1)* form. The Beneficiary information must be entered be entered for the **Basic Life** and, if applicable, the **Sup Life** plans. If the employee information (**employee's name**, **EIN**, and **company**) is already displayed at the top of the page, **skip to Step #54**.

52. **Company: Select Company** from the drop down menu. **Enter** "**1"** for Active employees or "**7"** for University employees and Retirees.

53. **Employee: Enter** the **Employee Identification Number** (**EIN**).

54. **Benefit Type: Enter** or **select** "**EL**" from the drop down menu.

55. **Plan: Enter** or **select** the appropriate plan, according to the employee's enrollment form, from the drop down menu.

56. **FC: Select** or **enter** "**A**" to "**Add**" each beneficiary on separate lines.

57. **Type:** Make the applicable selection from the drop down menu. **Enter** or **select** "**0**" or select "**Individual**" for an individual beneficiary; **enter** or **select** "**1**" or "**Trust**" for a trust fund.

58. **Primary or Contingent: Enter** "**1**" or **select** "**Primary**" for a primary beneficiary; **enter** "**2**" or **select** "**Contingent**" for a contingent beneficiary.

59. **Percent or Amount: Enter** "**P**" or **select** "**Percent**" from the drop down menu. **You must specify Percentage "P" (not amount).**

60. **Amount: Enter** the percent amount. If there are multiple **primary** or **contingent** beneficiaries, the total amount of primary beneficiaries must equal 100%, and the total amount of contingent beneficiaries must equal 100%.

61. Click on the **More** tab at the bottom of the screen. This section must be completed for each beneficiary.

62. **Last Name:** Use the second field to enter the last name in the "**Last Name**" field. If dependent has a suffix (e.g., Jr., III), input this information in the third field.

63. **First Name: Enter** the first name in the "**First Name**" field.

64. **Middle Initial: Enter** the middle initial in the "**Middle Initial**" field.

65. If the beneficiary has a different address than the employee click on the address tab to enter the beneficiary's address. You will be required to enter the country code for the address – enter "US" for the United States.

66. To add more beneficiaries, **repeat Steps #56-#66** for each beneficiary.

67. **Click** on the **Add** button on the blue tool bar at the top of the form. This will display **"Add complete, continue"** message in the bottom left-hand corner of the window.

68. If the participant has **more than one beneficiary plan**, **repeat Steps #52-#68** for each different plan, adding each beneficiary indicated.

69. **Click** the **Close** button on the blue tool bar at the top to close this form. This completes the new participant enrollment steps.